



North Carolina Division of Tourism, Film & Sports Development

Tourism's 2008 Economic Impact

Sixth most visited state

\$16.86 billion in domestic visitor spending

\$1.385 billion in state and local tax revenues

190,500 jobs

62 counties saw increases in visitor spending 2008

- 35 generated more than \$100 million each
- 33 had 1,000+ tourism supported jobs

Direct Visitor Spending—Coastal Region

Region	2008 Visitor Expenditures (\$ millions)	Percent Change (2007-2008)	2008 Payroll (\$ millions)	2008 Employment (thousands)	2008 State Tax Receipts (\$ millions)	2008 Local Tax Receipts (\$ millions)
Southeast	\$1,595.88	1.4%	\$320.05	18.00	\$79.80	\$63.60
Eastern	\$1,333.09	2.3%	\$248.45	13.71	\$68.30	\$45.91
Northeast	\$1,222.69	1.5%	\$242.92	15.34	\$59.89	\$58.21
Total Coastal	\$4,151.66	1.6%	\$811.42	47.05	\$207.99	\$167.73
State of NC	\$16,864.62	2.1%	\$4,181.67	190.50	\$843.21	\$542.27

Southeast Region: Bladen, Brunswick, Columbus, Cumberland, Hoke, New Hanover, Pender, Richmond, Robeson, Sampson, Scotland

Eastern Region: Carteret, Craven, Duplin, Edgecombe, Greene, Jones, Lenoir, Nash, Onslow, Pamlico, Pitt, Wayne, Wilson

Northeast Region: Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Tyrrell, Washington

Statewide Impact

Any environmental issue that affects the coast has the potential to have huge negative implications to the entire state.

I-40 Rockslide Research

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
The rock slide blocking I-40 would be a major inconvenience					
Charlotte	12.7%	22.4%	24.2%	23.6%	17.0%
Raleigh	16.5%	23.4%	27.7%	17.6%	14.9%
The rock slide blocking I-40 would cause me to take an alternate driving route.					
Charlotte	12.5%	25.5%	21.2%	20.0%	18.2%
Raleigh	19.7%	26.1%	23.9%	18.1%	12.2%
The rock slide blocking I-40 would make it more difficult for me to get to my destination.					
Charlotte	12.7%	21.8%	24.2%	21.8%	19.4%
Raleigh	12.8%	27.1%	27.1%	20.2%	12.8%
The rock slide blocking I-40 would create traffic or delays on my normal or alternate route.					
Charlotte	18.2%	26.1%	23.6%	16.4%	15.8%
Raleigh	17.0%	29.3%	29.3%	11.7%	12.8%
The rock slide blocking I-40 would have no impact on my travel plans.					
Charlotte	28.5%	20.6%	20.6%	21.2%	9.1%
Raleigh	20.2%	20.2%	27.1%	21.8%	10.6%

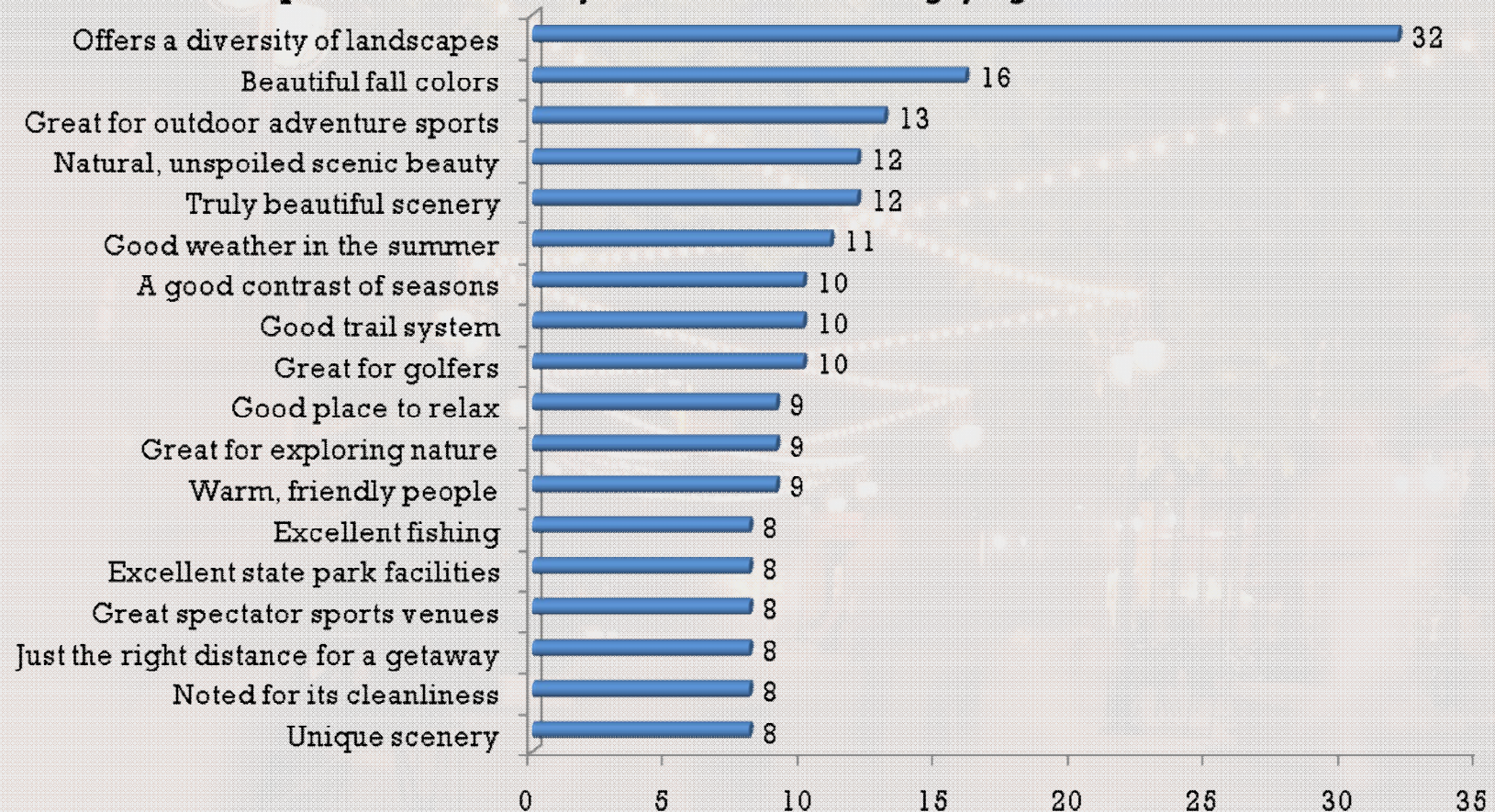


North Carolina's Brand

North Carolina is the state to visit for rest and relaxation in a setting of natural, scenic beauty

Research – Main Strengths vs. Competitors

Percentage difference between NC and its competitive set in respondents from key markets who strongly agree with travel attribute

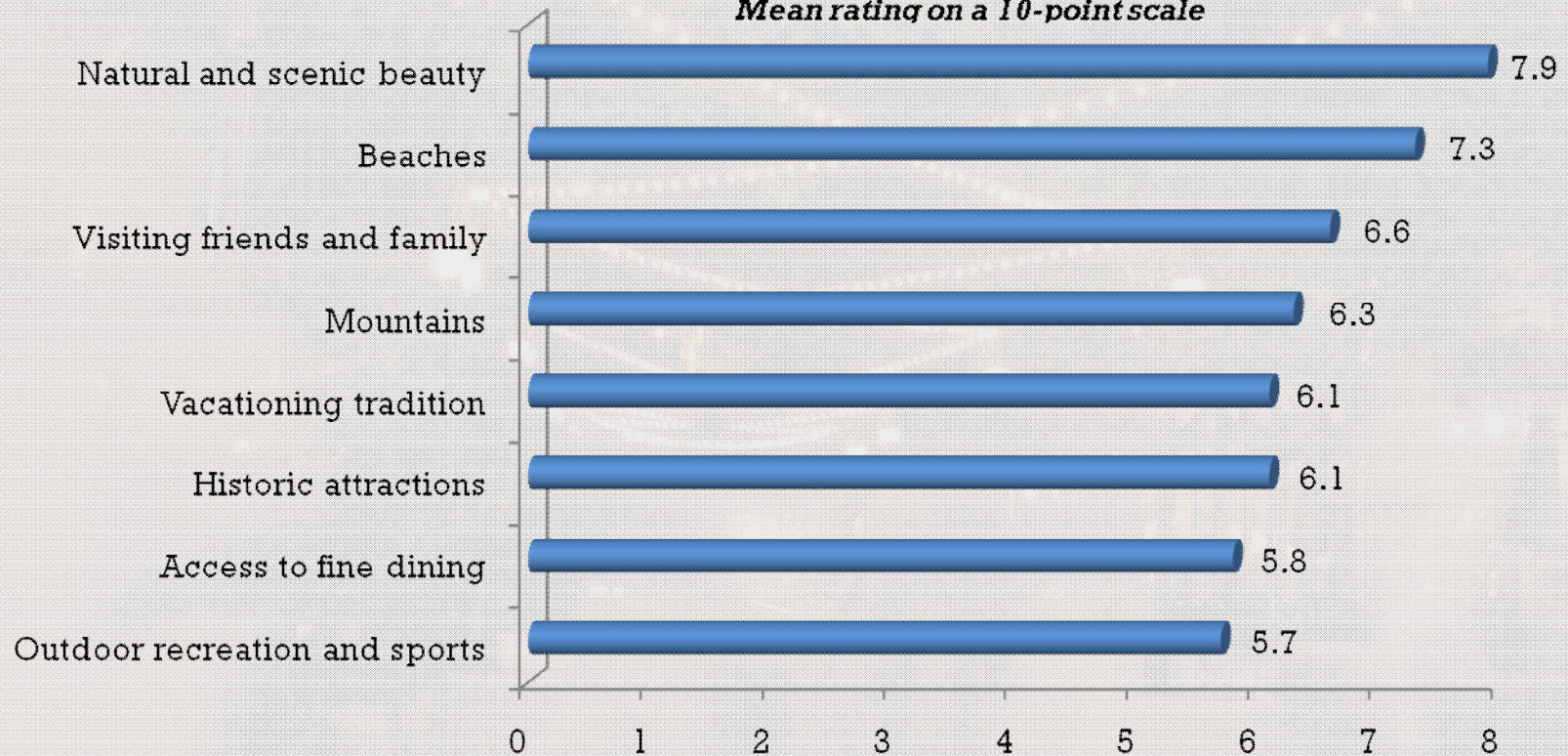


Competitive set includes Virginia, Tennessee, West Virginia, South Carolina, Georgia and Florida
Longwoods International, 2006

Research – Travel Decision Contributors

Important contributors to North Carolina residents when deciding where to go for a leisure weekend

Mean rating on a 10-point scale

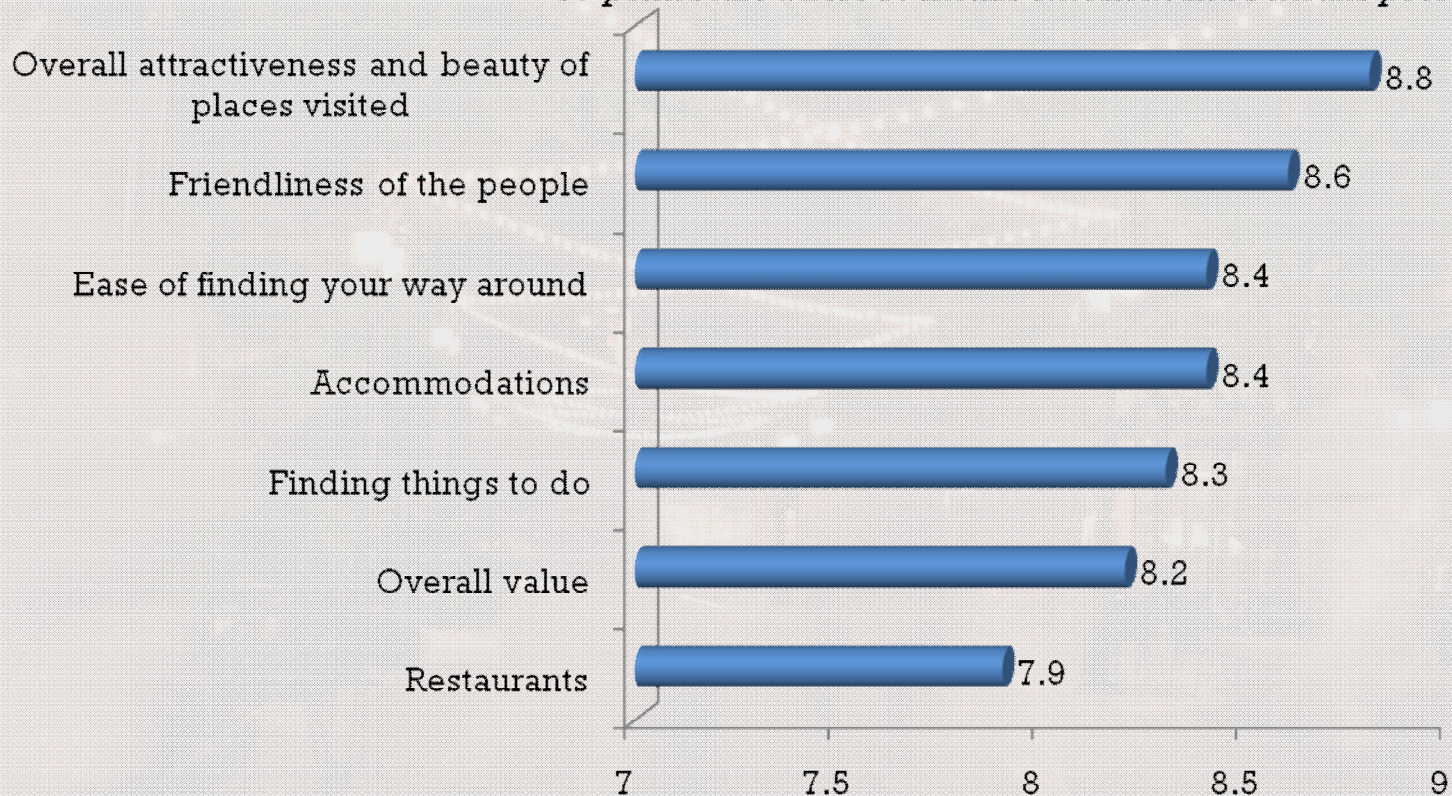


Alan Newman Research for the NC Division of Tourism, 2008

Research – Recent Visitors Ratings of NC

Rating of aspects of vacation or leisure trips to North Carolina

10-point scale where 10 means excellent and 1 means poor



Alan Newman Research for the NC Division of Tourism, 2003

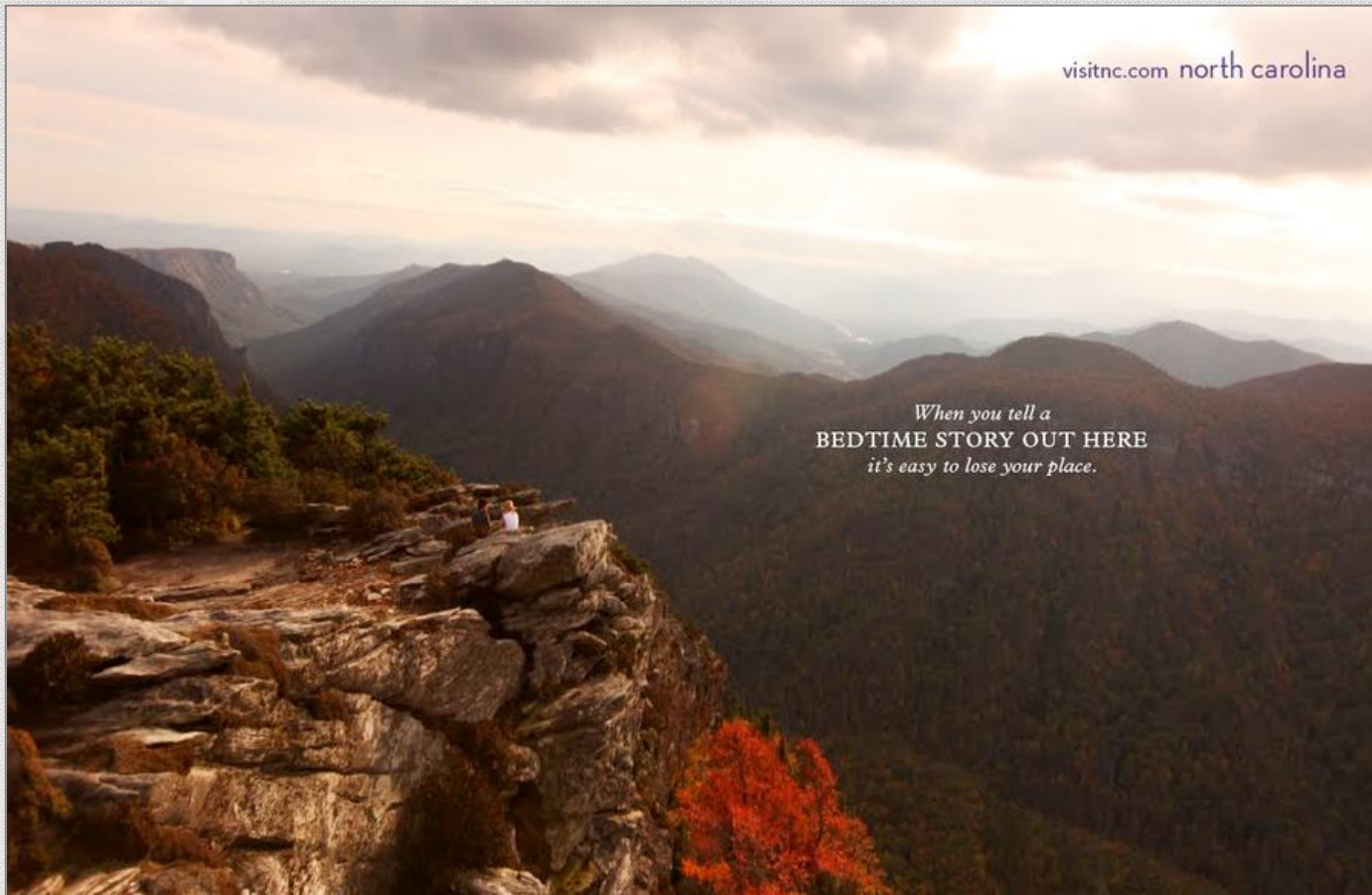
Simple Pleasures: Outdoor Playground



Simple Pleasures: Child Within



Simple Pleasures: Living the story

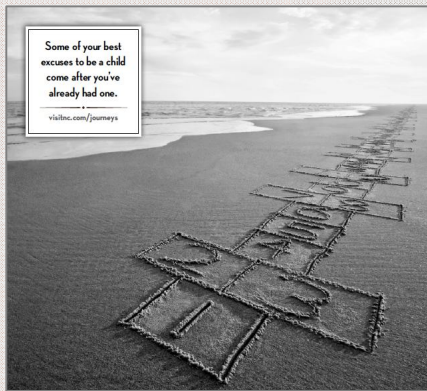
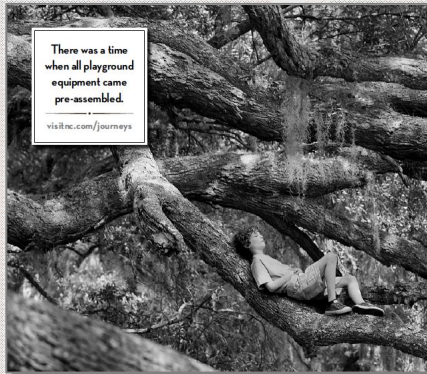


Simple Pleasures: Affordable Indulgences



Simple Pleasures: In-State

Press Foundation




NC Outdoor Association



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Some of your best excuses
to be a child come after
you've already had one.

Beach - Bald Head Island, NC

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There was a time when
all playground equipment
came pre-assembled.

Orton Plantation Gardens - Winnebrow, NC

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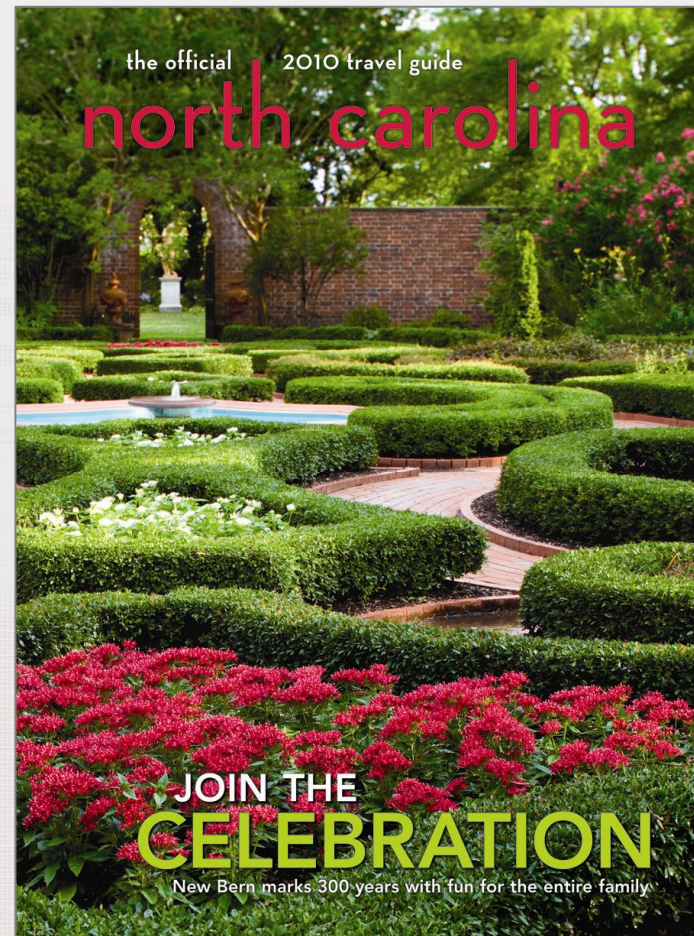
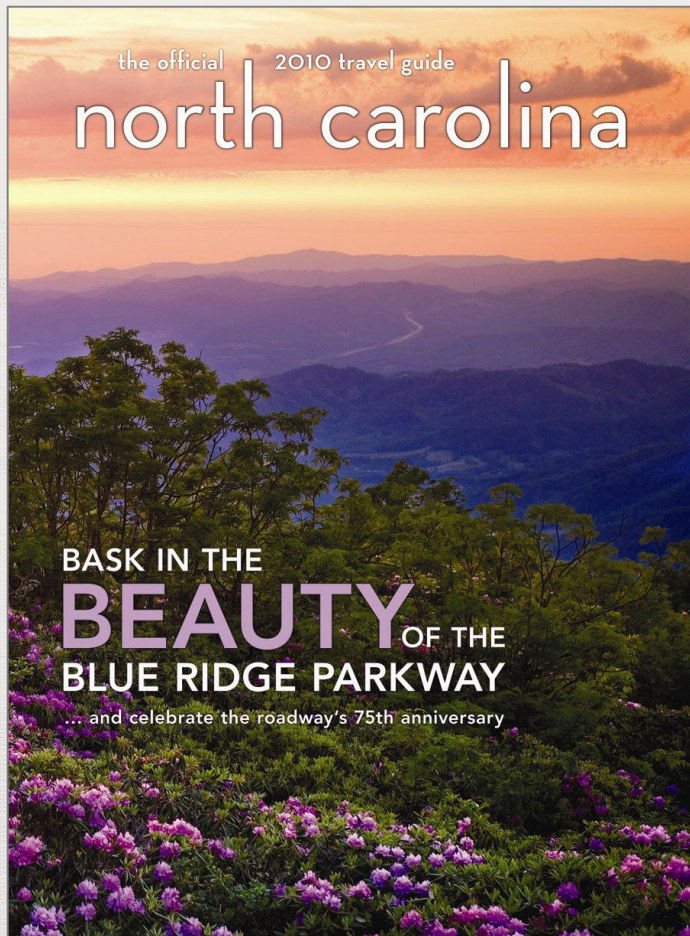
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Wisdom is realizing
that catching up is more
important than keeping up.

Brightleaf Square - Durham, NC

Travel Guide



Previous Campaigns



Resources

Visitor spending by economic development region:

<http://www.nccommerce.com/NR/rdonlyres/EB704669-7C4F-420E-A514-96F7401B6838/0/2008EconomicDevelopmentRegions.pdf>

Longwoods Study:

<http://www.nccommerce.com/NR/rdonlyres/41CAB58F-E30D-455F-95F6-864A44605997/0/LongwoodsPresentation.pdf>

NC Resident Research Study:

<http://www.nccommerce.com/NR/rdonlyres/64CEFF73-3B66-439D-BA48-8F865CA69337/0/2008NorthCarolinaTourismNCResidentStudy.pdf>

2009 Rockslide Research:

<http://www.nccommerce.com/NR/rdonlyres/20E06B70-5F4B-449D-8EE2-987CE561BF72/0/RockslideResearchforweb.pdf>